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ABSTRACT

This booklet describes and outlines a course, "Office Procedures", which is intended as a review for people preparing to take Part VI of the Certified Professional Secretary (CPS) Examination. The ten lessons cover secretarial planning, office management, the physical office environment, records management, data processing, communications media in the office, making copies of printed material, writing business letters and memorandums, writing business reports and other material, and sources of business information. Each chapter lists objectives, content outline, and teaching suggestions together with 25 bibliographic references. (KP)

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INSTRUCTOR'S GUIDE FOR AN ADULT COURSE

ED 083403

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OFFICE PROCEDURES

Part VI in a Series

Preparation for CERTIFIED PROFESSIONAL SECRETARY Examination

CE 000 393

THE UNIVERSITY OF THE STATE OF NEW YORK/THE STATE EDUCATION DEPARTMENT
BUREAU OF CONTINUING EDUCATION CURRICULUM DEVELOPMENT/ALBANY, NEW YORK 12224

Part VI in a Series
Preparation for Certified Professional Secretary Examination

Office Procedures

A Suggested Adult Business Education
Course

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
Bureau of Continuing Education Curriculum Development
Albany, New York 12224
1973

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Foreword

The course described in this booklet, *Office Procedures*, is intended as a review for those preparing to take Part VI of the Certified Professional Secretary (CPS) examination. Part VI of this examination, which is given by the National Secretaries Association (International), bears the same title as this booklet. This course can also be the basis of a class for those secretaries wishing to update their skills in office procedures.

Six courses to cover the six parts of the CPS examination were planned by a committee consisting of the following: Marian N. Batten, CPS, secretary to the manager of Nonexempt Compensation and Benefits, General Electric Company, Schenectady; Hobart H. Conover, chief of the Bureau of Business Education; Carla V. R. Delray, CPS, manager of Office Services and Corporate Planning Administration, Mohasco Industries, Amsterdam; Adrian C. Gonyea, dean, School of Business, Hudson Valley Community College, Troy; E. Noah Gould, associate, Bureau of Continuing Curriculum; Florence E. Graham, chairman, Business Education Department, Draper High School, Rotterdam; Margaret A. McKenna, associate professor of business education, State University of New York at Albany; B. Bertha Wakin, professor of business education, State University of New York at Albany; and Eugene Whitney, associate, Bureau of Business Education. Mr. Gould and Mr. Whitney were cochairmen.

This course, *Office Procedures*, was written by Miss Graham; revisions were made by Miss McKenna. Miss Wakin directly supervised the writing and is coordinating the content among the courses in the series. Mr. Gould did the final editing of this manuscript and is in general charge of the series.

HERBERT BOTHAMLEY, *Chief*
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GORDON E. VAN HOOFT, *Director*
Division of Curriculum Development

Message to the Instructor

This instructor's guide is intended as an aid in the presentation of a well organized course. Since it is a review course, those entering it are expected to have a good background in the subject content. Upon completion of the course the student will hopefully have improved and refined her knowledge and skills in office procedures, and will be better equipped to take Part VI of the CPS examination.

The content of this booklet is suitable for use in the adult education programs of school districts and of Boards of Cooperative Educational Services (BOCES), and possibly in the community colleges of New York State. The instructor should be a person with both office experience in secretarial skills and experience in teaching office procedures or other business subjects. Well experienced certified professional secretaries are another possible source of instructors.

The content of this course can generally be covered in 10 sessions of 3 hours each, but this pattern is by no means universal, nor is it mandatory in any sense. For those students who wish to cover some topics in greater depth, the instructor may wish to suggest materials for independent study.

An instructor or administrator who needs help in planning or conducting a course using this publication may contact the Bureau of Business Education.

HOBART H. CONOVER, *Chief*
Bureau of Business Education

ROBERT H. BIELEFELD, *Director*
Division of Occupational Education Instruction

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Lesson 1

Secretarial Planning

OBJECTIVES

To acquaint the instructor with the students and the students with each other

To present an overview of the course

To give students an understanding of secretarial planning

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Introduction to the Course	Introduce yourself to the class and have the students introduce themselves. Suggest that students give name, employment information, reason for taking the course. Try to achieve an informal class atmosphere. Distribute cards and have students record their name, address, telephone number; reason for taking the course; name of present employer; type of business; job title; previous jobs held. Explain to the class that telephone numbers are valuable if a class is cancelled or changed due to weather or illness. Collect the cards when they are completed and use them to get to know the students. The teacher may want to make a seating chart as self-introductions are made.

A. Course purpose	The purpose of the course is to review and update information about office procedures.
B. Textbooks and references	Students should have a secretarial procedures textbook. Any one of the following would be appropriate: Anderson, Meehan, or Place *(College Secretarial Procedures)*.* They should have a reference manual such as Engel, Gavin, House, or Hutchinson. Students should also read in the area of data processing (Abrams, Arnold, Awad, Elliott, or Wanous) and office management (Bohl, Neuner, or Terry).
C. Course outline	Discuss in general terms the content of the course: secretarial planning, office management, records management, data processing, communications media, writing business communications, and using reference materials.
II. Secretarial Planning	A secretary's work involves a considerable amount of detail. To master the details, a secretary must systematize and organize the job. This includes scheduling time, handling routine work, coordinating with the office staff, and arranging the work area.
A. Work for immediate superior	An important part of a secretary's job is that work which she does to assist her immediate superior to do his work more efficiently.
1. Appointments	Discuss how a secretary can assist in organizing her immediate superior's appointment calendar. To do this efficiently she must know his wishes about seeing visitors and scheduling appointments. She must protect him from unnecessary interruptions and prevent conflicting engagements. She must synchronize her calendar with his.
2. Schedules	A secretary plays an important role in seeing that her employer's deadlines are met. Discuss how she can record recurring events, regularly scheduled meetings, and can use files of pending

*Full reference citations are given in the bibliography.

	work to organize materials for regular meetings and for reports that her employer must prepare.
3. Relief from detail	Discuss how a secretary can conserve her superior's time by assuming as much detail work as is practical. Depending upon her knowledge, experience, and judgment, she may write or edit letters and reports, screen telephone calls, route mail, order supplies, and perform other tasks that require varying degrees of decisionmaking ability and authority.
4. Coordinating with office staff	Discuss the fact that a secretary's work involves relations with many people within a business: other executives, secretaries, clerical workers. She must be able to maintain good relations with these people to work effectively with them.
B. Secretary's own work	Expand on the details of planning, timing, and organizing work.
1. Priorities of work	In discussing the priorities of jobs, list three columns on the chalkboard: jobs to do at once, jobs to do as soon as possible, jobs to do during a slack period. With the assistance of the class, record examples in each column.
2. Arrangement of work area	Have each class member make a rough sketch of the materials on top of a typical secretary's desk. This will lead into a discussion of the importance of organizing the work area for efficient work. In a similar way, sketches may be made of desk drawers, office equipment, and furniture. *Teacher references:* Meehan, Unit I; Anderson, Chap. 4; Terry, Chaps. 1 and 2.

Lesson 2

Office Management

OBJECTIVES

At the end of this lesson, the student will understand the basic concepts of office management, including:

the function of office work,
the management of information,
the control of clerical services, and
work simplification, and

Will appreciate the role of the secretary in office management.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. The Function of Office Work A. Management of information	The office is more than a place where clerical activities are performed. Its function is the management of information. It has responsibility for the collection, processing, storage, retrieval, and distribution of information.
B. An information processing center	Discuss the concept of the office as the information processing center and the secretary's role as an assistant in the administration of the office. *Teacher references:* Neuner, Chap. 1; Terry, Chap. 1.
II. Information Management A. Large volumes of data involved	New machines, such as computers, microform devices, copiers, and data communications links have made it

	possible to produce large volumes of data at great speeds. These new machines require new systems and trained personnel to manage them.
B. Total systems concept	Discuss the total systems concept of information management which provides a companywide information network. Use transparencies and the overhead projector to show the use of flow charts, lines of communication, time studies, etc. *Teacher references:* Neuner, Chaps. 1, 2, and 8; Terry, Chaps. 1 and 2.
III. Control of Clerical Services	The clerical services of an office include: typing, transcription, filing, mailing, duplicating, and computing activities.
A. Centralized vs. decentralized	Discuss each of these activities as they are performed in the modern office. Cover centralized vs. decentralized control of each of these activities. Include the equipment and personnel needs for each function. *Teacher references:* Neuner, Chaps. 7, 8, and 9.
IV. Work Simplification	Work simplification is a systematic plan used to reduce the cost of office work without impairing its effectiveness, while still assisting management in attaining its objectives.
A. Objectives	Clarify the objectives of work simplification as they are concerned with business information and forms, the flow of work, and the use of machines and personnel. *Teacher references:* Neuner, Chaps. 15 and 16; Terry, Chap. 4.
B. Ways of systematizing	Discuss also the ways in which a secretary can systematize her job by organizing the work. *Teacher reference:* Anderson, Chap. 4.

Discussion questions and cases found at the end of each chapter of Neuner will be helpful in getting class members to participate in the discussion. They may also be able to contribute examples from their own offices to illustrate points discussed.

V. Word Processing

Introduce word processing as a system for handling all written communications in a business.

Teacher references: Modern Office Procedures, August 1972, pp. 36-45 contains a good description of word processing systems. Each month a section of *Administrative Management* is devoted to word processing.

Lesson 3
The Physical Office Environment

OBJECTIVES

At the end of this lesson, the student will:

Understand the physical office environment including management considerations of office furniture and equipment,

Appreciate the effect of lighting, noise, and office layout on those working in the office, and

Understand the considerations involved in selecting and controlling office supplies.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Work Environment	
A. Space management	How space is planned and utilized affects the efficiency and productivity of the workers. In an office, space management involves: consideration of the physical features of the office; the needs of departments, including location and special facilities; the work being performed; the employees; the equipment and furniture. *Teacher references:* Neuner, Chaps. 4 and 5; Terry, Chaps. 16, 17, and 18. The magazine *Administrative Management* is an excellent source of descriptions and pictures of office layouts. Each year the editors select "offices of

the year," and articles on these offices provide up-to-date information on office planning.

B. Lighting

Proper lighting has both physical and psychological effects on workers. Discuss the guidelines for office lighting.

Teacher references: Neuner, Chap. 6; Terry, Chap. 18.

C. Noise control

The increased number and use of machines in offices has resulted in increased noise which must be controlled. Discuss the sources and effects of noise in the office and means by which it can be controlled.

Teacher references: Neuner, Chap. 6; Terry, Chap. 18.

D. Furniture

Office furniture is generally used for long periods and it represents substantial expenditure. Hence, care in its selection and use is important.

Describe the various types of office desks and chairs that are available and the factors to be considered in their purchase. Discuss modular office furniture. Show pictures from magazines or catalogs.

II. Office Supplies

Procedures for obtaining and controlling office supplies should be discussed. These would include:

1. Selection: use and standards,
2. Control: location of stockroom, maximum and minimum quantities, and issue of supplies
3. Inventory: marginal stock items, quantity limitations for issues, perpetual inventory

Bring to class catalogs of office supplies and samples of supplies, where possible.

Teacher references: Anderson, Chaps. 1, 3, 5, and 19; Gregg, Units 4 and 6; Terry, Chap. 15.

Lesson 4

Records Management

OBJECTIVES

At the end of this lesson, the student will:

Understand the rules of alphabetic filing, the basic systems of filing, and special adaptations,

Be able to use the filing vocabulary, and

Appreciate the importance of records retention and systematic disposal.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Need for Records Management	Filing is the "memory" of business. Because information is filed, business men and women are relieved of much routine remembering. Their brains are thus released for creative thinking. Discuss the dependence of a business on stored information.
A. Philosophy of filing, control and retention of records	Explain centralized vs. decentralized files and advantages of each type. Discuss the philosophy of business on control and retention of records. Have students discuss the role of the secretary in developing and updating the filing system. Ask the members of the class to discuss the various filing methods used in their past and present positions.

	Teacher references: Anderson, Chap. 9; Neuner, Chap. 8.
B. Systems of filing	Discuss the basic filing systems and their uses. Include in the discussion the advantages and disadvantages of alphabetic, geographic, numeric, and subject filing, and the factors involved in selecting a filing system. *Teacher reference:* Kahn, Chaps. 3, 6, 7, and 8.
C. Variations of the basic systems	Outline briefly the soundex, numeric-decimal, and triple-check systems.
D. Techniques of filing	Give a short quiz to see how well the class knows the alphabetic filing rules. Check the quiz in class. This may be done by using a transparency showing correct answers and having the students check their work. (Do not build up fear of grading for a mark; make the quiz strictly diagnostic.) Discuss the rules for alphabetic filing. This could be done as you check the quiz, emphasizing rules students have trouble with.
E. Preparing material for filing	Explain how to get material ready for filing. Include information about release marks, indexing and coding, cross referencing, and sorting. *Teacher references:* Meehan, Unit 11; Kahn, Chap. 2.
F. Controlling material taken from the file	Explain procedures for taking material from the files: the use of an *out guide* for an entire folder, a substitution card for a single sheet, a carrier folder, or a photocopy. *Teacher references:* Meehan, Unit 12; Kahn, Chap. 4.
II. Retention and Disposal of Records	Records retention involves: the survey of all existing records, the development of schedules for retaining these records, the systematic transfer from active files to inactive storage, or other disposal of records no longer needed.

A. Classification of records	Records may be classified as vital, important, useful, and nonessential. Discuss the types of records that would fall into each of these categories. *Teacher reference:* Anderson, Chap. 9.
B. Retention schedules	Once the records have been classified, schedules for retention can be set up. Discuss how long the various types of records should be kept. *Teacher reference:* Anderson, Chap. 9.
C. Transfer systems	Discuss periodic transfer including one-period, two-period and maximum-minimum period. Also discuss perpetual transfer of records and when it is used. *Teacher references:* Anderson, Chap. 9; Kahn, Chap. 4.
III. Equipment	Explore the factors to be considered in procuring and evaluating filing equipment and supplies.
A. Vertical files	Discuss how records are filed vertically and the various types of vertical filing equipment and supplies that are available. Use pictures from textbooks and magazines to show the equipment that students may not be familiar with, such as card files, open shelf, lateral files, motorized, and other special types.
B. Microrecords	Have the class discuss the advantages and disadvantages of microfilming records. Also cover format for micro-records, including filmstrips, jacketed film, aperture cards, and microfiche; and systems used in photographing, indexing, and viewing microrecords. *Teacher references:* Anderson, Chap. 9; Neuner, Chap. 8; Kahn, Chap. 4.

Lesson 5

Data Processing

OBJECTIVES

At the end of this lesson, the student will be able to:
Give several examples of punched card systems,
Explain the relationships among ADP, EDP, and IDP,
Explain how computers are used in modern business, and
Explain the impact of computers on business and society.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. General Description of Data Processing	Begin by giving a brief overview and history of data processing. Relate examples to students' everyday living showing how students have been involved in data processing. As examples use utility bills, credit cards, school report cards, etc. If data processing equipment is located in the school building, arrange for a demonstration. Or, perhaps a student in the class works for a company which could demonstrate its computer installation. A field trip for part of the session could help in the explanation.
A. Steps in processing data	Define and discuss the steps in processing data: classifying, sorting, computing, recording, summarizing, communicating, and storing.

B. Data processing systems	Define the systems of data processing: IDP Integrated data processing ADP Automated data processing EDP Electronic data processing Explain that it is desirable to understand the systems even though the students may not need to be involved with the inner working of the equipment.
C. Mechanical data processing	Describe the functions and operations of adding, calculating, and accounting machines. Demonstrate the machines if they are available.
D. Automated data processing	Give an overall definition of ADP and then discuss the elements as given below.
1. Common language media	Describe and show examples of the following media: punched cards, IBM and Univac mark-sensed cards edge-punched cards paper tape magnetic tape magnetic ink characters
2. Punched card equipment	Explain the functions and purposes of the following punched card equipment: key punch machine verifier reproducer sorter collator tabulator interpreter Demonstrate the equipment if it is available. Otherwise show pictures.
E. Electronic data processing	Bring resource books with pictures of various kinds of equipment to class. Operation manuals printed by equipment manufacturers would be helpful. Discuss programming, flow charting, analog and digital computers, computer languages. Give students practice in making flow charts. Describe input devices, storage unit, arithmetic/logic unit, output devices, control unit, storage unit.

II. Effects, Costs, Transmission of Data

A. Effect on the organization

At this point have class members discuss data processing in their businesses and the effects on management, clerical workers, and other employees.

B. Factors that determine use

Discuss cost analysis, selection and maintenance of equipment, standardization, purchase of equipment vs. shared time.

C. Transmission of data

Explain the difference between a point-to-point communication system and a computer-based network. You can point out that, in a point-to-point system, data are transmitted at varying speeds over either private leased lines or regular telephone lines between two or more terminals. In a computer-based network, however, a large number of people located throughout a wide area can communicate via telephone lines with each other and a central operator.

III. Business Uses

Students should be able from their reading and business experience to contribute to a useful class discussion which will bring out the varied uses and applications of data processing in business. Perhaps you can bring out applications in banking, and in engineering and other technical operations. Also, common applications like payroll and billing as they are used in various businesses can be discussed.

Teacher references: Meehan, Unit 6; Anderson, Chap. 16; Aspley, Chap. 54; Gregg, Unit 15; Neuner, Chaps. 2, 24, and 25; Place, *Office Management*, Chaps. 4 – 10; Terry, Chaps. 7 - 12; Wanous, the entire book.

Lesson 6.

Communications Media in the Office

OBJECTIVES

At the end of this lesson, the student will:

Understand the use of telephone and telegraph services in business, including her role in those services,

Understand the details of mail services,

Be able to perform her role in mail services, and

Be able to choose and apply an appropriate communications method for communications problems which are likely to arise in an office.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Office Communications	Discuss the activities involved in sending and receiving information in an office. These include written and oral communications that are transmitted internally and externally, using many forms and a variety of equipment.
II. The Telephone in Business	
A. Types of telephone service available	Cover with the class some of the more recent options in telephone rate structures. The public relations department of your local telephone company will be very helpful to you in gathering the information for this discussion.

	Mention long distance calls, including direct dialing and automatic dialing equipment. Also include answering services: human vs. automatic; switching services: PBX, console. Centrex; tie lines; WATS lines.
B. Recent innovations in equipment and service	Discuss the following equipment and services: touch-tone, key telephones, call directors, speakerphones, special signaling devices, mobile telephones, dataphones, picturephones. Check with the telephone company for any new equipment. Students can probably contribute information to the discussion about services or equipment used in their companies.
III. Telegrams in Business	Telegrams are messages sent over Western Union wires or radio beams, and are used when fast communication and a written record of the message are necessary.
A. Types of service	Describe (1) the domestic and international services available, and (2) the considerations in selecting the service to be used, including time zones and costs.
B. Preparation of message	Show students how a telegram is typed on the blank Western Union provides. Include: service desired, name and address of the person or firm to which it is to be delivered, a brief but complete message, the signature. Indicate to the students how charges are computed and let them practice counting words.
C. Transmission of message	Discuss the ways businesses usually send telegrams: telex and teltex, desk fax, teleprinter, leased wire. Compare the relative speed and expense of these media.
IV. Mailing Services	Check with the local post office to be sure you have the most recent information about postal services.

	A. Postal information	Identify: classes of mail; use of zip codes; special services such as C.O.D., special delivery, registered mail, insured mail, certified mail; also money orders and two-letter state abbreviations.
	B. Incoming mail	Explain the sorting and routing of incoming mail and preparing it for reply.
	C. Outgoing mail	Also go into the handling of outgoing mail in the office where it is prepared and in the mail room.
V.	Other Communications Media	Discuss such other media as paging systems, intercom systems, messenger systems, private carriers of mail, closed circuit television, flip charts, and overhead transparencies.
VI.	Comparison of Uses, Costs, and Limitations	Have available for this section typical office situations in which a secretary must decide on the appropriate method of communication. Use these for class discussion in problem solving. *Teacher references:* Anderson, Chaps. 17, 18, and 21; Aspley, Chaps. 39 and 47; Gavin, Sec. 15; Gregg, Units 10 and 11; Meehan, Units 7 and 9; Neuner, Chaps. 7 and 9; Terry, Chap. 12; Whalen, Sec. 2 (postal information only).

Lesson 7

Making Copies of Printed Material

OBJECTIVES

At the end of this lesson, the student will:
Understand the machines used in duplicating work, and
Know where and when to use the various methods of duplicating.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Duplicating Equipment	If possible, have the class meet in the office machines classroom so you can demonstrate the equipment. If this is not possible, use pictures.
A. Copying equipment	Review the types of copying process and their advantages and disadvantages. Include office copiers and the use of commercial copying services.
B. Duplicating	Describe (and demonstrate if possible): spirit duplicators, stencil duplicators, and offset duplicators.
C. Other reproduction equipment	Discuss reproduction by use of automatic typewriters, Vari-Typer, Justowriter, and commercial printers. If any of this equipment is available, demonstrate it.
II. Preparing Material for Duplication	Elaborate on the preparation of typed copy for various duplicating methods. Demonstrate how to draw and write for duplication and how to correct copy.

If possible have students prepare masters for liquid and stencil duplication. Otherwise have samples of typed masters to show them.

III. Operating the Machine

Demonstrate the operation of any machines that are available. If none are available describe their operation.

IV. Selecting the Method of Duplication

Discuss the following considerations in choosing a duplicating method: appearance, quantity, availability of equipment, cost, nature of reader, urgency. In discussing duplicating methods, rely on the experience of the students as to how and when to use various processes.

Teacher references: Anderson, Chap. 20; Aspley, Chap. 50; Gavin, Sec. 13; Gregg, Unit 14; Meehan, Unit 10; Neuner, Chap. 9; Place, *Office Management*, Chap. 6; Terry, Chap. 15.

Lesson 8

Writing Business Letters and Memorandums

OBJECTIVES

After completing this lesson, the student will:

Have reviewed correct English in business and know her own shortcomings in this area,

Have studied the elements of an effective letter, and

Be able to write various kinds of business letters and memos.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Grammar, Spelling, and Punctuation	Review briefly grammar, punctuation, spelling, and word division. One way of doing this is to administer a quiz (not for grading purposes) that will indicate areas of weakness. Have students correct their own papers and discuss them as they correct. Suggest references for those students who need additional study.
II. Business Letter Writing	
A. Elements of an effective letter 1. Correctness	A correct letter is correct in every way: grammar, spelling, punctuation, typing, inside address, salutation, facts, etc. Discuss the importance of correctness and the impression a carelessly written or typed letter can give a reader.

2. Completeness	A complete letter is long enough to cover the situation adequately and short enough to be understood easily.
3. Courtesy	Explain the "you" attitude as it applies to courtesy in business letters. Tact, sincerity, and appropriate tone are also important to courtesy.
B. Steps in letter writing	
1. Purpose	Discuss the necessity for stating specifically the purpose of a letter before writing it.
2. Points to include	Mention the need to determine ahead of time the points to be included in the letter.
3. Particulars	Emphasize the importance of collecting all pertinent facts before starting to write a letter. Include, for example: inside address, content information, enclosures.
4. Plan	List the elements to be included in each part of the letter: opening, body, closing. You could now show the class some actual business letters that do or do not contain the elements of an effective letter. Discuss whether or not the writer followed the suggested steps for letter writing.
C. Kinds of letters	Obviously you cannot review every type of letter used in business, but you can present a representative sample of the following kinds: acknowledgment, appointment and cancellation of appointment, adjustment, credit and collection, employment, reminder, inquiry, order, transmittal, public relations and sales promotion, reservation, etc. You could also duplicate some examples of some of these letters for class discussion and prepare some simple letter problems for the class to write and discuss.

D. Interoffice memorandums	Elaborate on the content and format of interoffice memorandums.
E. Social-business letter writing	Present information on the following types of business letters: speaking invitations—request, acceptance, refusal; informal and social invitations; introductions; favors; congratulations; condolences. Have the students write one or more of these. As an assignment, ask the students to bring company handbooks for use in the next session. *Teacher references:* Anderson, Chaps. 11 and 12; Aspley, Chap. 36; Aurner, most sections are applicable; Gavin, Secs. 1 - 11, 14 and 16; Gregg, Units 5 and 8; Meehan, Units 3, 4, and 5; Place, *Office Management*, Chap. 8; Terry, Chap. 6.

Lesson 9

Writing Business Reports and Other Material

OBJECTIVES

After completing this lesson, the student will:

Be familiar with the reports, handbooks, speeches, minutes, news releases and other material written in the business,

Be able to take and write minutes of a meeting, and

Be able to prepare written material for publication.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Formal Reports	Outline the steps in preparing a formal report: planning, gathering information, organizing facts, outlining, drafting, editing, typing.
A. Format	The secretary may be responsible for the following elements in the finished report: accuracy, completeness, readability, attractiveness.
	Discuss the following parts of a formal report: 1. Use of visual aids: charts, pictures, sketches, etc. 2. Typing of the report 3. Collating and binding 4. Preparing: table of contents, appendix, bibliography, footnotes

II. Employee Handbooks	Using the company handbooks students have brought to class and any that you may have collected, go over their purposes, material included, and format. Cover also the secretary's role in the preparation and revision of such a document.
III. Speeches	Frequently a secretary may assist her employer in preparing a speech. Her work may include assistance in checking factual information, quotations, punctuation, spelling, etc. Discuss this aspect of the work as well as the typing of the first draft, revisions, and final copy. Illustrate with actual examples if possible.
IV. Minutes of Meetings	
A. Procedure in taking minutes	Review with the class what the secretary's responsibility may be in taking the minutes of a meeting. Include suggestions for taking attendance, situations in which verbatim notes are required, etc.
B. Contents of minutes	Discuss the elements that are usually included in the minutes of a meeting and how they are written. Describe the handling of motions and resolutions, quotations, and editing in the minutes. Have the students listen to a tape-recorded meeting and prepare minutes for it. If some of the students have had experience in taking minutes, either in an organization in which they hold office or for their employer, have them discuss the experience and the problems they encountered.
C. Preparing the minutes	Explain the preparation of a rough draft of minutes, its approval by the chairman or whoever else is required to approve, and the final typing. Practice can be given to students in preparing the minutes in final form

		by giving them handwritten notes of a meeting for editing and typing.
	D. Followup of meeting	After the minutes have been approved, the secretary may have certain duties to perform as a result of business transacted at a meeting. She may have to notify people of their appointments to committees or election to office, for example. Discuss the followup of a meeting with students.
V.	News Releases	Review with the students the journalistic style and format of a news release.
		Teacher references: Anderson, Chaps. 13, 14, and 15; Aspley, Chap. 35.

Lesson 10
Sources of Business Information

OBJECTIVES

At the end of this lesson, the student will:
understand how to use a library
be able to illustrate how to get information from reference books, periodicals, vertical files, periodical indexes, and directories,
know what desk references a secretary should have available, and
know the most common uses of these desk references.

CONTENT OUTLINE	TEACHING SUGGESTIONS AND REFERENCES
I. Knowledge of Research Facilities	If possible, the class should meet in the school or public library for the first half of the time period. Conduct the class with the aid of the librarian. If the library is not available, bring the source materials to class as far as possible.
A. Kinds of materials	Discuss the kinds of materials available in public and in-company libraries. Explain the general collection of a library and the use of the card catalog. Have students examine several versions of *Who's Who*, *Bartlett's Familiar Quotations*, one or more almanacs, a gazetteer, an atlas, a thesaurus, and some encyclopedias; also other pertinent reference books.

Discuss other materials like periodicals, microfilms, vertical files, and the use of *Reader's Guide* and other periodical indexes.

Have students complete an exercise which requires them to look up information from various library sources.

II. Use of Desk References

There are some references which should be within easy reach of the secretary. These include a dictionary, a secretarial handbook, a thesaurus, an almanac of general information, and office manuals. Review the uses a secretary would make of each of these and have them examine samples.

Other references should be easily accessible to a secretary. These include directories such as telephone, city, and business. She should also be familiar with the *Hotel and Motel Red Book*. Examine and discuss these with the class.

III. Summary of the Course

Remind the students that the course was a review of office procedures. Because of the wealth of materials, a completely detailed course could not be given in the time available.

A. Other adult courses

Mention other adult courses that would supplement this course. These include:

Environmental Relationships in Business,
Business and Public Policy,
Economics and Management,
Financial Analysis and the Mathematics of Business, and
Communications and Decision Making.

B. Certified professional secretary rating

Review the elements of the Office Procedures part of the CPS exam.

Give the following address for further information about the exam and applying to take it:

Institute for Certifying Secretaries
2440 Pershing Road
Kansas City, Missouri 64108

IV. Course Evaluation	Have a brief checklist ready for a course evaluation. Include such items as length of course, length of sessions, time and place of instruction, course content, and suggestions for improving the course. Invite evaluations either signed or unsigned.

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